

PRE-BID CONFERENCE  
for  
RFQ# 139A-23 MBTA Wholesale Electricity  
RFQ# 139B-23 MBTA Renewable Energy  
Certificates (REC's)  
Request for Qualifications (RFQ)

Wednesday August 9, 2023, 3:30– 4:30p.m.





# Introductions

- **Robert Weiner**, Strategic Sourcing Manager
- Procurement & Logistics
- Sean Donaghy, Manager of Energy Programs
- Environmental Affairs



# Pre-Bid Logistics

- First and most important...
- Thank you for being here and for your interest in partnering with the MBTA
- This RFQ will be managed via COMMBUYS. Instructions for log-in and use of COMMBUYS are described in [Instructions for Vendors Responding to Bids](#)
- For COMMBUYS assistance please contact the OSD Help Desk at 888-MA-State (627-8283) or [osdhelpdesk@mass.gov](mailto:osdhelpdesk@mass.gov).
- This presentation in part or in whole is not meant to take precedence over the RFQ documents in RFQ 139A-23 and 139B-23 as posted on COMMBUYS, please refer to COMMBUYS for the most accurate information.
- All communication regarding this bid must be submitted to the MBTA Procurement & Logistics point of contact via COMMBUYS.

10/09/2023





# Agenda

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Session Expectations

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Overview of the Contract

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Request for Qualification (RFQ) Structure

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Documents to be included in Your  
Response

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Important Dates

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Overview of the Diversity & Inclusion  
Requirements

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Training & Additional Resources

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General Q&A

# Session Expectations



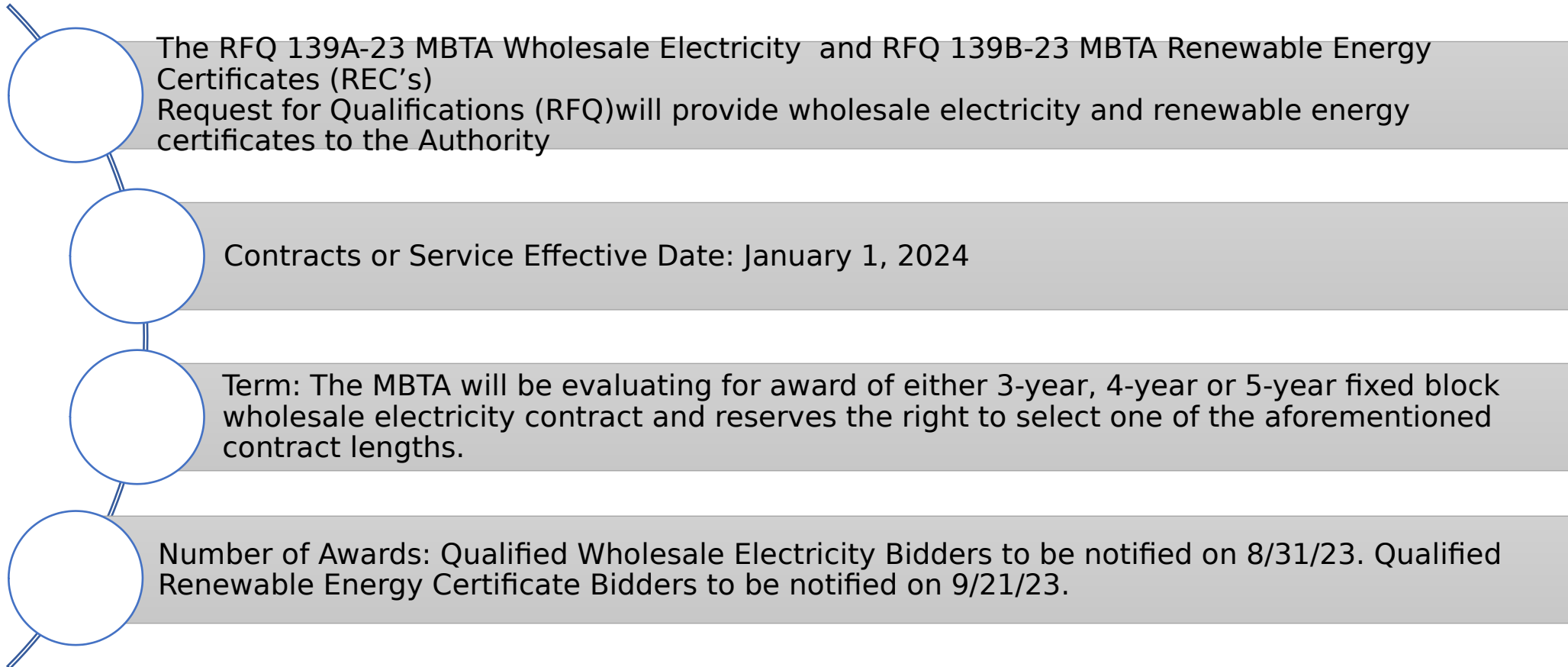
Today's session is not a substitute for reading the Request for Qualification (RFQ) document. The RFQ includes important contract and response details that will not be covered during today's meeting.



Although we will take general questions about the authority's bidding process, at the end of today's session, questions about the bid must be submitted through **COMMBUYS** using the Q&A feature before the Q&A deadline.



The COMMBUYS Q&A feature and important deadlines will be covered later in the presentation.

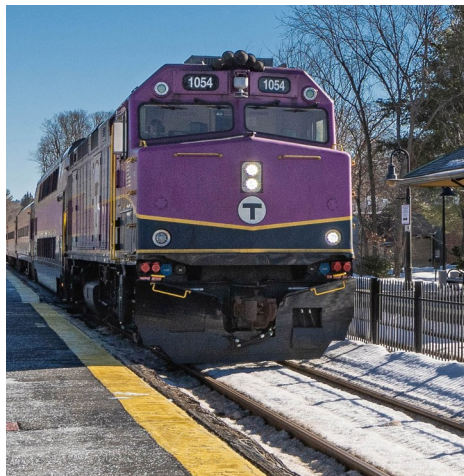




# RFQ 139A-23 MBTA Wholesale Electricity

## Request for Qualification (RFQ) Overview

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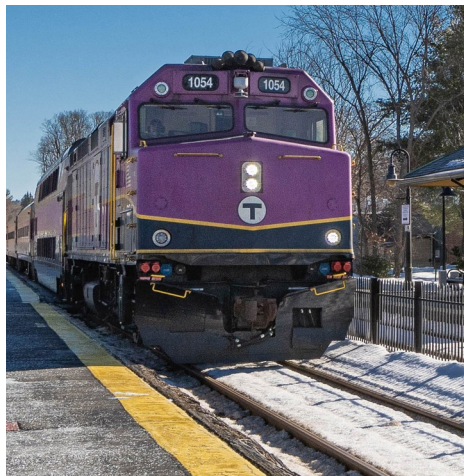
### *RFQ 139A-23 MBTA Wholesale Electricity*

The MBTA is seeking a fixed block wholesale electricity contract as described in this Request for Qualifications (RFQ) 139A-23 for response by qualified Bidders.

Submission of a response as described in this RFQ is required to pre-qualify and participate in a subsequent Request for Qualification (RFQ).

All Bidders must be ISO-NE market participants.





### *RFQ 139B-23 MBTA Renewable Energy Certificates (REC's)*

The MBTA is seeking pricing and availability of New England Qualified Renewable Energy Credits (REC's) for a 3-year, 4-year, or 5-year Contract Term.

The MBTA seeks to cover its full load of 360,000 MWh annually for the Contract Term.

All bidders must be NEPOOL market participants registered in NEPOOL GIS. All REC's, both Class 1 and Class 2, must be sourced from projects within the NEPOOL GIS system.

All bids must source RECs from renewable projects that have their production tracked and certified in the NEPOOL GIS system.

The MBTA will only accept bids from projects that generate RECs through the NEPOOL GIS system.





# RFQ Structure

	Introduction	Scope of Work	Bidders Instructions & Procurement Process	Submission of Response	Selection Process & Evaluation	Contract Terms & Conditions	Attachments	Response Forms
Description	Introduction of RFQ	Describes the Scope of Work	Provides overview of procurement process of RFQ and instructions	Directs the vendors how and what documentation to submit with a Qualification	Responsiveness Review and Evaluation	Contains the contractual terms by which Bidder is expected to abide	Supporting Documentation	Required Forms to be included with submission
Key Information	Duration of Contract (3-Year, 4-Year, or 5-Year Term) Background	Scope of Work Deliverables	Bid Conference RFQ Calendar Rules of Contract Insurance	Submit on COMMBUYS Form A: RFQ Response and supporting documents Form B: Small Business Attestation	Bidders will not advance to the subsequent RFP phase unless they have provided a satisfactory & complete response to the RFQ	Standard Terms and Conditions	Forms and Attachments	Form A: RFQ Response and supporting documents Form B: Small Business Attestation Agreement to MBTA Terms and Conditions

# RFQ Bid Submission

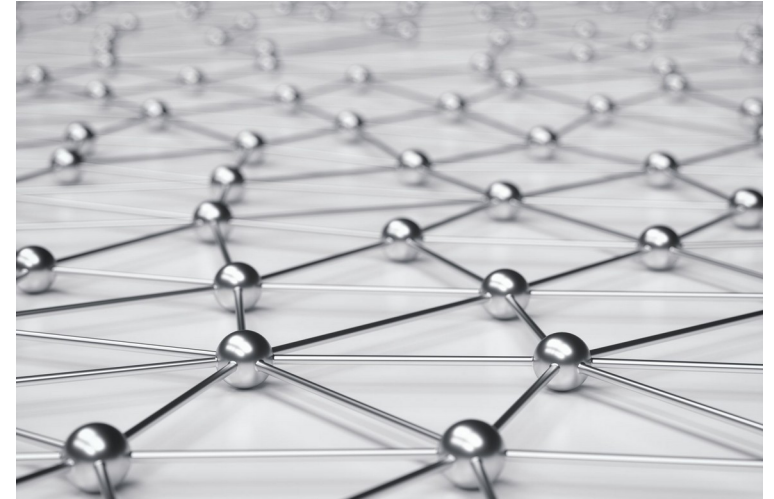
## RFQ 139A-23 MBTA Wholesale Electricity

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### Submission of Response

#### Request for Qualification Response including:

- Bid Cover Letter
- Power of Attorney (as described in Section 4.2 of the RFQ)
- Form A: RFQ Response Form and supporting documents
  - Bidder Legal standing
  - Agreement to MBTA Terms and Conditions
  - Financial Strength
  - Credit Strength
  - Bidder Experience including ISO NE market participation
- Form B: Small Business Program Attestation Form
- MBTA Terms and Conditions (Section 8.1) with Bidder modifications to Section 8.1.18.16 (g) and other requested edits, if any



*The specific requirements for submissions of the **Request for Qualification Response** are included in **Form A**.*



# RFQ Response Evaluation Criteria

## RFQ 139A-23 MBTA Wholesale Electricity

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### RFQ Response Evaluation Criteria

*RFQs will be evaluated on the Evaluation Criteria identified below. The MBTA may request Bidder clarification on any part of a Bidder's Response, after which MBTA may re-evaluate the Response, at MBTA's sole discretion.*

Criteria	Evaluation Basis
Bidder Legal standing	Form A Public records
Agreement to MBTA Terms and Conditions	RFQ Response
Financial Strength	Form A
Credit Strength	Form A
Bidder Experience including ISO NE market participation	Form A
Supplier Diversity	Form A

***Bidders will not advance to the subsequent RFP (or pricing) phase of the procurement unless they have provided a satisfactory, complete response to the RFQ. The MBTA reserves the right to limit the number of bidders invited to participate in the RFP phase of the procurement to just the highest rated Bidders according to the above criteria.***





# RFQ Bid Submission

## RFQ 139B-23 MBTA Renewable Energy Certificates (RECs)

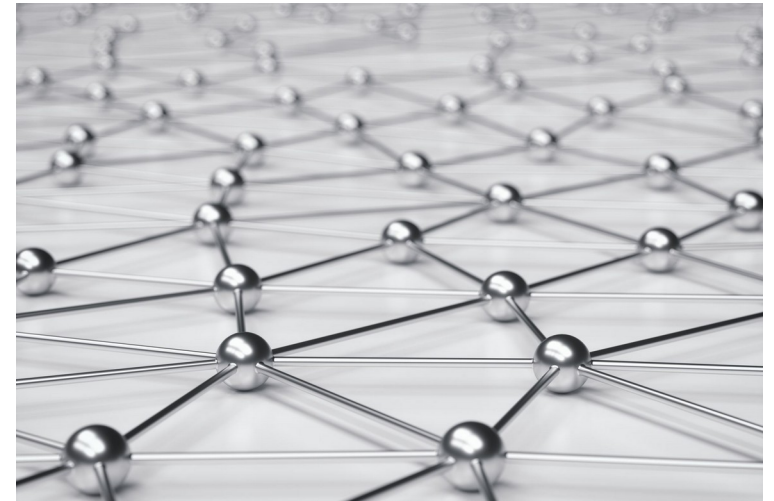
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### Submission of Response

#### Request for Qualification Response including:

- Bid Cover Letter
- Power of Attorney (as described in Section 4.2 of the RFQ)
- Form A: RFQ Response Form and supporting documents
  - Bidder Legal standing
  - Agreement to MBTA Terms and Conditions
  - Financial Strength
  - Credit Strength
  - Bidder Experience including ISO NE market participation
- Form B: Small Business Program Attestation Form
- MBTA Terms and Conditions (Attachment 1) with requested edits, if any

*The specific requirements for submissions of the **Request for Qualification Response** are included in **Form A**.*



# RFQ Response Evaluation Criteria

## RFQ 139B-23 MBTA Renewable Energy Certificates (RECs)

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### RFQ Response Evaluation Criteria

*RFQs will be evaluated on the Evaluation Criteria identified below. The MBTA may request Bidder clarification on any part of a Bidder's Response, after which MBTA may re-evaluate the Response, at MBTA's sole discretion.*

Criteria	Evaluation Basis
Bidder Legal standing	Form A Public records
Agreement to MBTA Terms and Conditions	RFQ Response
Financial Strength	Form A
Bidder Experience and Capabilities including NEPOOL GIS	Form A
Supplier Diversity	Form A

***Bidders will not advance to the subsequent RFP (or pricing) phase of the procurement unless they have provided a satisfactory, complete response to the RFQ. The MBTA reserves the right to limit the number of bidders invited to participate in the RFP phase of the procurement to just the highest rated Bidders according to the above criteria.***



# Bidder Evaluation

Bidder must complete all required forms and submit all other required forms listed in the RFQ

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The MBTA will evaluate each Response based on the requirements of the RFQs

All **Responses** will be reviewed for:

- ✓ The responsiveness of the Bidder to the requirements set forth in the RFQ.
- ✓ Conformance to the RFQ instructions regarding organization and format.
- ✓ Deficiencies and minor informalities, apparent clerical mistakes which are unrelated to the substantive content of

10/09/2023





# Bidder Evaluation

## RFQ 139A-23 Wholesale Electricity Qualifications

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- As described in Section Pricing 3.3, Bidders qualified through the RFQ process will be invited to submit pricing through an RFP process on **September 20, 2023**.
- RFP (or price) Responses will be evaluated for responsiveness. The MBTA will determine whether Responses are responsive and reasonable.
- The MBTA reserves the right to accept or reject, at its sole discretion, any or all Responses in full or in part.



# Bidder Evaluation

## RFQ 139B-23 Renewable Energy Certificates Qualifications

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- As described in Section Pricing 3.3, Bidders qualified through the RFQ process will be invited to submit pricing through an RFP process on **October 3, 2023**.
- RFP (or price) Responses will be evaluated for responsiveness. The MBTA will determine whether Responses are responsive and reasonable.
- The MBTA reserves the right to accept or reject, at its sole discretion, any or all Responses in full or in part.



# Performance Measures or Key Performance Indicators

Contractors performance after contract award will be measured as follows:

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- Contractors will be required to comply with Performance Measurements or Key Performance Indicators as outlined in the RFQ.
- Supplier Diversity Requirements.







# What Makes a Compliant Qualification Response?

- Be sure to read the RFQ.
- Pay attention to the mandatory requirements.
- Ensure all required documents are submitted.
- Complete the bidders' response forms in their entirety.

## RFQ 139A-23 Wholesale Electricity and Subsequent RFP CALENDAR

### Important Dates

RFQ 139A-23 Wholesale Electricity and Subsequent RFP CALENDAR		
Procurement Activity	Date	Time
RFQ issued	8/4/2023	
Pre-bid conference	8/9/2023	3:30 p.m.
Deadline for submission of Bidder questions via COMMBUYS Q&A	8/11/2023	2:00 p.m.
Official Answers for Bid Q&A published by MBTA on COMMBUYS	8/14/2023	4:00 p.m.
Response Due Date RFQ <b>Wholesale Electricity</b>	8/24/2023	2:00 p.m.
Qualified Wholesale Electricity Bidders notified	8/31/2023	
Wholesale Electricity Terms and Conditions Finalized (if necessary)	9/15/2023	
RFP (or price request) issued for Wholesale Electricity to Qualified Bidders	9/20/2023	9:00 a.m.
Bidder Wholesale Electricity Price Bids Due	9/20/2023	1:00 p.m.
<b>Transaction Agreement Execution</b>	9/20/2023	2:00 p.m.

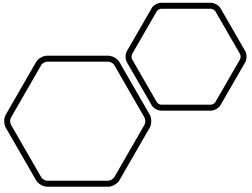
# RFQ 139B-23 Renewable Energy Certificates CALENDAR and Subsequent RFP Calendar

## Important Dates

### RFQ 139B-23 Renewable Energy Certificates CALENDAR and Subsequent RFP Calendar

Procurement Activity	Date	Time
RFQ issued	8/4/2023	
Pre-bid conference	8/9/2023	3:30 p.m.
Deadline for submission of Bidder questions via COMMBUYS Q&A	8/25/2023	2:00 p.m.
Official Answers for Bid Q&A published by MBTA on COMMBUYS	8/28/2023	4:00 p.m.
Response Due Date RFQ <b>Renewable Energy Certificates</b>	9/14/2023	2:00 p.m.
Qualified Renewable Energy Certificate Bidders notified	9/21/2023	
Renewable Energy Certificates Terms and Conditions Finalized (if necessary)	9/29/2023	
RFP (or price request) issued for Renewable Energy Certificates (RECs) to Qualified Bidders	10/3/2023	9:00 a.m.
Bidder RECs Price Submission due	10/3/2023	2:00 p.m.
<b>Transaction Agreement Execution</b>	10/5/2023	2:00 p.m.





# Overview of Supplier Diversity & Inclusion

# Supplier Diversity & Inclusion Program

The Commonwealth's Supplier Diversity Program (SDP) promotes business-to-business relationships between awarded Contractors and diverse businesses and non-profit organizations (SDP Partners) certified or recognized by the Supplier Diversity Office (SDO). The MBTA seeks Qualifications that incorporate participation by SDP Partners in as many aspects of the services as possible.

Section five of the RFQ provides bidders with detailed information and resources relating to:

- Program background
- Financial Commitment Requirements
- Eligible SDP Partner Certification Categories
- Eligible Types of Business-to-Business Relationships
- Program Flexibility
- SDP Spending Reports and Compliance

# Key Supplier Diversity Contract Requirements

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1. Provide a specific commitment on this contract to be spent with certified Supplier Diversity Program vendors on a Massachusetts fiscal year (July 1st - June 30th) basis.
2. What business opportunities have you established with diverse vendors? What partnerships could you leverage with diverse vendors specific to this procurement?
3. Submit your company's Supplier Diversity program and/or provide any additional diversity efforts not mentioned above (ex. diverse hiring practices, diverse community outreach).

 **Response to the SDP requirements apply even if your company:**

- Does not have SDP Partners at the moment.
- Is a certified diverse business



# Recognized Third-Party Certifying Organizations

Certifying Organizations	Certification Category
Greater New England Minority Supplier Development Council (GNEMSDC)	MBE
Center for Women & Enterprise (CWE) (New England – WBENC)	WBE
City of Boston	MBE/WBE
VetBiz/U.S. Department of Veterans Affairs	VOSB/SDVOSB
NGLCC – National LGBT Chamber of Commerce	LGBTBE
Disability: IN (formerly the US Business Leadership Network – USBLN)	DOBE and SDVOBE



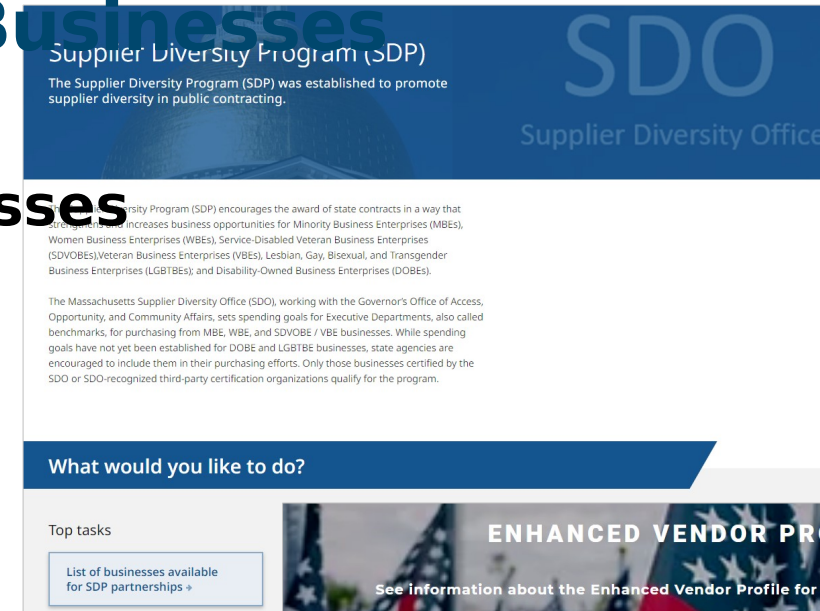
# Finding Partners

## Online Directories of Certified Businesses



### 1 The SDO Directory of Certified Businesses

- More than 3,700 certified businesses
- MBE, WBE, VBE, SDVOBE, DOBE, LGBTBE
- [www.mass.gov/sdp](http://www.mass.gov/sdp)



### 2 The U.S. Veterans Administration Vendor Information Pages (VIP)

- More than 14,000 certified businesses
- VOSB, SDVOSB
- <https://vetbiz.va.gov/basic-search/>

A screenshot of the "Enhanced Vendor Profile" page for VA Contracting Officers. The page has a header with the text "ENHANCED VENDOR PROFILE" and "See information about the Enhanced Vendor Profile for VA Contracting Officers". Below this is a button labeled "Enhanced Vendor Profile". The main section is titled "FIND VETERAN OWNED BUSINESSES" and contains a search form with various fields: "Search by VOSB or SDVOSB?", "Business Name", "Doing Business As", "DUNS", "PSC", "NAICS", "Keywords - Separate keywords with blank spaces", "FSC", "Web Address", "Cage Code", "Green NAICS", "Purchase Card", and "All".

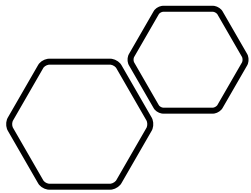
# Finding Eligible Certified Partners



- 1 Find **current** suppliers that are **certified****  
*Review the lists of eligible SDP partners from the SDO and VetBiz directories and compare your current suppliers to those lists.*
- 2 Find **current** suppliers that **may be certified****  
*Survey your suppliers to find diverse companies that are not certified or are certified by an organization other than the Massachusetts SDO. Connect them with the SDO ([sdp@mass.gov](mailto:sdp@mass.gov)) and encourage them to get certified.*
- 3 Identify **subcontracting needs** that may be met **by a new diverse business partner****  
*On an ongoing basis, closely monitor incoming state orders and projects for the potential to hire diverse businesses as subcontractors.*
- 4 Identify **general business needs** that may be met **by a new diverse business partner****  
*On an ongoing basis, review your company's business needs, including one-time purchases, to find areas where you may include new diverse suppliers.*



Online Certification  
Self-Assessment Tool:  
<https://www.mass.gov/forms/take-the-certification-self-assessment>



# Training Resources



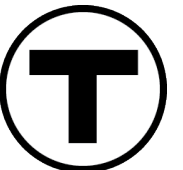
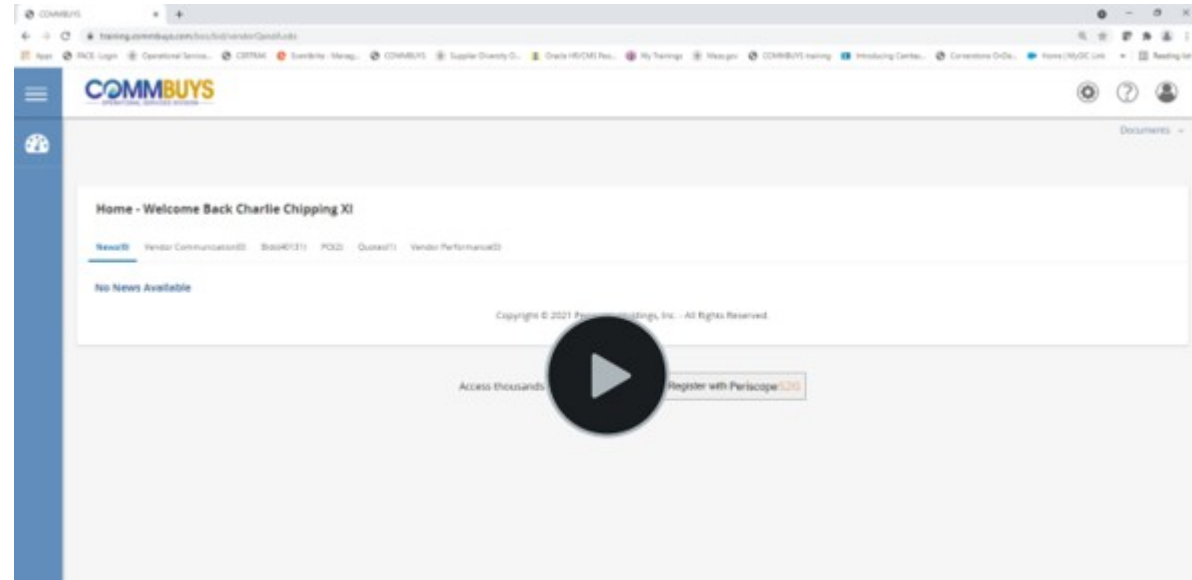
# COMMBUYS Q&A

COMMBUYS Q&A is a tool to manage dialogue between buyers and bidders.

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Please watch this short video that demonstrates how to use the tool to ask questions about the bid.

[Link to the video](#)





**View**



## Pre-recorded Webcast

*How to Locate and Respond to Bid Solicitations in COMMBUYS*

[Link to the recording.](#)

**Participate**



Link to the  
[Vendor Training Schedule;](#)

**Read**



## Job Aids

[How to Create a Quote in COMMBUYS](#)  
[Using the Q&A Tab within a COMMBUYS Bid](#)  
[How to Withdraw, Reopen, and Resubmit a Quote](#)  
[Basic COMMBUYS Navigation and Searching for the Seller Role](#)



# Important steps to follow for bid submission

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## Acknowledge the Bid

Bidders are encouraged to *Acknowledge* the bid to be notified of any updates/amendments to the bid, including changes to the bid opening date/due date.

To receive these updates:

- Login to COMMBUYS
- Navigate to the bid using the *Advanced Search*
- Select "Yes" on the *Acknowledge Receipt and View Solicitation* window.

You must be registered in COMMBUYS to take this action.

## Plan to Submit Your Response

- All responses must be submitted in COMMBUYS by the Bid Opening Date and Time; **late responses may not be accepted.**
- It is imperative that bidders allow sufficient time to submit their quote, and bidders are advised – at a minimum – to begin well in advance of the Bid Opening Date and at a time when OSD Help Desk staff are available for questions.

## Questions?

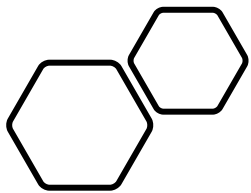
**OSD Help Desk**

**Monday - Friday, 8:00 a.m. - 5:00 p.m.**

**888-MA-State (627-8283)**

**[OSDHelpDesk@mass.gov](mailto:OSDHelpDesk@mass.gov)**





# Questions?

# Closing

- This presentation in part or in whole is not meant to take precedence over the RFQ documents in RFQ 139A-23 and 139B-23 as posted on COMMBUYS, please refer to COMMBUYS for the most accurate information.
- RFQ Schedule and any dates mentioned are subject to change at the discretion of the MBTA. Please refer to COMMBUYS for the most accurate information.
- Questions For RFQ 139A-23 should be posted on COMMBUYS (Deadline - August 11, 2023, by 2:00pm)
- Questions For RFQ 139B-23 should be posted on COMMBUYS (Deadline - August 25, 2023, by 2:00pm)
- Any and all communication during the non-mandatory Bidders' Conference of August 9, 2023, represents no favor to attendees. All Bidders' responses will be treated equally regardless of attendance.
- This Presentation will be posted on COMMBUYS in the File Attachments section.
- **Thank You for your interest in partnering with the MBTA**



Thank you for attending!

